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This job aid covers referral activities in Affiliate Link including:

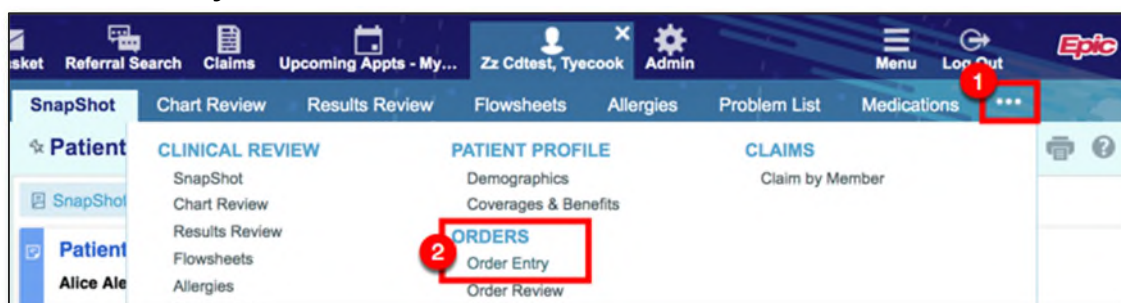
- Requesting a new referral for patients to other providers and other locations
- Reviewing existing referrals for a patient
- Searching for referrals by provider or status
- Customizing referral notifications in the Event Monitor on the Affiliate Link home page

Request a New Referral

Referrals are created in Order Entry. Prior to creating a referral or a request for services, review the patient's demographic information as well as their insurance coverage and benefits. (See Patient Demographics, Coverage and Benefits job aid).

To create a new referral

1. From a patient chart, click the **More** menu (⋮) to get to **Orders**.
2. Click **Order Entry**.



3. Click **Preference List**.



4. Click the **Procedures** section to open it. Then click **Referrals**.
5. Select the referral you want to order.
6. Click **Accept Orders** to close the preference list.

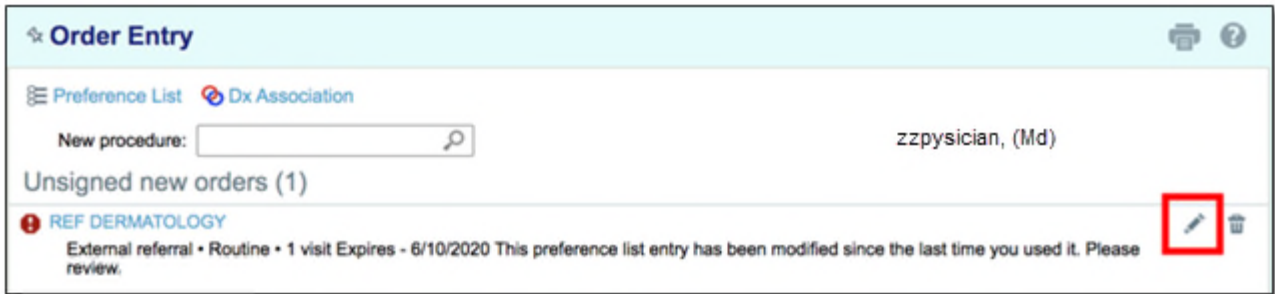


Note: If you know the name of a previously ordered a referral, you can use the **New procedure** field to search for the referral, beginning with "ref".



To complete/edit the referral

1. Locate the referral in the Order Entry screen and then click the **pencil icon** to edit it.



2. Use **F2** on your keyboard to complete the fields in the referral SmartPhrase.
3. Complete the Referral details including:
 - The **Priority** level.
 - The **provider** or **location** where the patient is being referred.
Note: Click the magnifying glass to search using additional criteria.
 - A referral **expiration date**.
 - The **number of visits** for the referral.
4. **Attach files** if necessary.
5. Associate a **Diagnosis**.
6. Click **Accept** to complete the referral. Or click **Cancel** to cancel the referral.

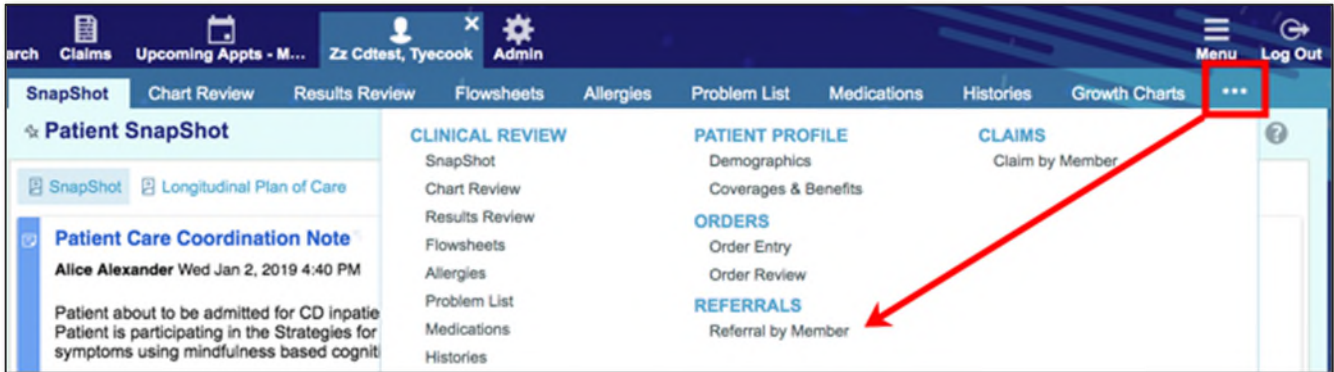
The screenshot shows the 'Order Entry - Edit Order' screen for 'REF DERMATOLOGY'. The interface includes a comment field with a warning icon and a SmartPhrase. Below the comment are scheduling instructions. The 'Referral' section is highlighted with a red box and a red circle '3'. It contains fields for 'Priority' (set to 'Routine [1]'), 'To provider', 'Address', 'To loc/pos', 'Exp date' (set to '6/10/2020'), and '# of visits' (set to '1'). Below the referral section is the 'Attach files' section with an 'Add files' button and a file upload area. The 'Dx association' section is highlighted with a red circle '5' and contains a list of 'Quick Picks' with checkboxes and associated codes. At the bottom right, there are 'Accept' and 'Cancel' buttons, with a red circle '6' highlighting them.

Diagnosis	Code
ACUTE HEPATITIS C	B17.10
ADENOCARCINOMA, LUNG	C34.90
ADHD	F90.9
ADVANCE DIRECTIVE STATUS COUNSELING	Z71.89
ASPLENIA	Q89.01
ATRIAL FIBRILLATION, PAROXYSMAL	I48.0

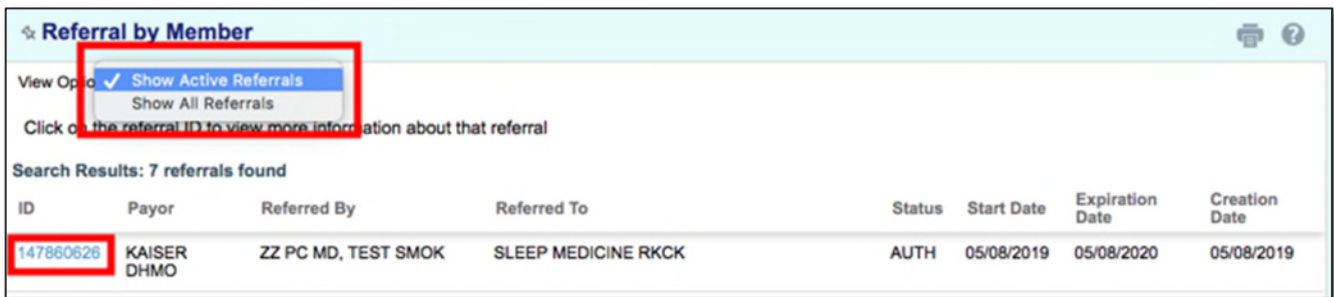
View Existing Referrals for a Patient

To view a list of existing referrals for a specific patient, follow these steps:

1. With a patient selected, click the **More** menu and then click **Referral by Member**.



2. Select if you want to view **Active Referrals** or **All Referrals**.
Note: The default view is **Active Referrals**, which means referrals with a status of New, Open, Authorized, or Pending Review. **All Referrals** includes Closed, Denied, and Canceled referrals.
3. Click the **ID** link for a specific referral to view the Referral Details.



Once you have opened Referral Details in the step above, you can do any of the following:

1. Click **Referral Message** and to send an InBasket message about the referral or click **Add Note/Attachment** to add information to the referral.
Note: Referral messages can also be sent from the In Basket (see In Basket Job Aid).
2. Click the **Status History** link to view the status of the referral.
3. Click the links to view the **referral order** and the **encounter** in which the referral order was released.

Referral by Member > Referral Details 🖨️ ?

[Add Note/Attachment](#) [Referral Message](#) 1

Referral

Referral # 147860626

Referral Information

Referral # 147860626	Creation Date 05/08/2019	Referral Status Authorized 2	Status Update 05/08/2019: Status History
Status Reason System Automatic Approval	Referral Type Consult	Referral Reasons Specialty Services Required	Referral Class Internal
To Specialty none	To Provider none	To Location/Place of Service ROCK CREEK MEDICAL OFFICES	To Department SLEEP MEDICINE RKCK
To Vendor none	Referred By Tyler Zmacmillan, MD	By Location/Place of Service ROCK CREEK MEDICAL OFFICES	By Department SLEEP MEDICINE RKCK
Priority Routine	Start Date 05/08/2019	Expiration Date 05/08/2020	Referral Entered By Cynthia A Bonner
Visits Requested 1	Visits Authorized 1	Visits Completed	Visits Scheduled

Procedure Information

Procedure	Modifiers	Revenue Code	Provider	Requested	Approved
218408 - REFERRAL SLEEP DISORDERS, OTHER.	None	None		1	1

Diagnosis Information

Diagnosis
487.1 (ICD-9-CM) - J11.1 (ICD-10-CM) - INFLUENZA LIKE ILLNESS

Referral Notes

Type	Date	User	Summary	Number of Notes: 1
Provider Comments	05/08/2019 10:27 PM	Cynthia A Bonner	Provider Comments	-

Note
This referral is for a consultation with a Sleep Medicine physician for a sleep disorder other than suspected obstructive sleep apnea or insomnia.

This member is being referred for the following reason/symptoms: test
This member has been diagnosed with the following complex sleep disorder in the past and would like to speak with a Sleep Medicine physician: test

Referral Order

Order
REFERRAL SLEEP DISORDERS, OTHER. (Order # 226951757) on 05/08/2019
[View Encounter](#)

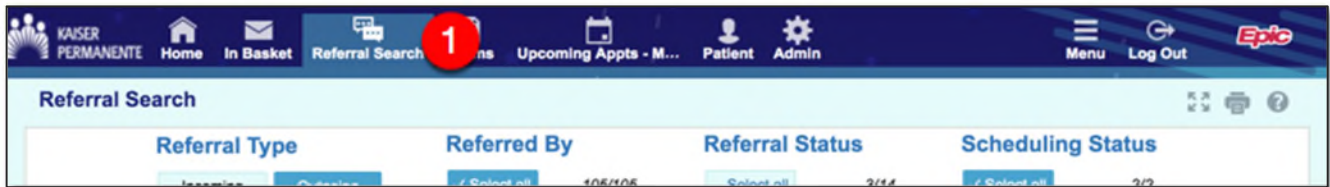
Disclaimer
For services to be covered, patient must be eligible on the date of service.

3

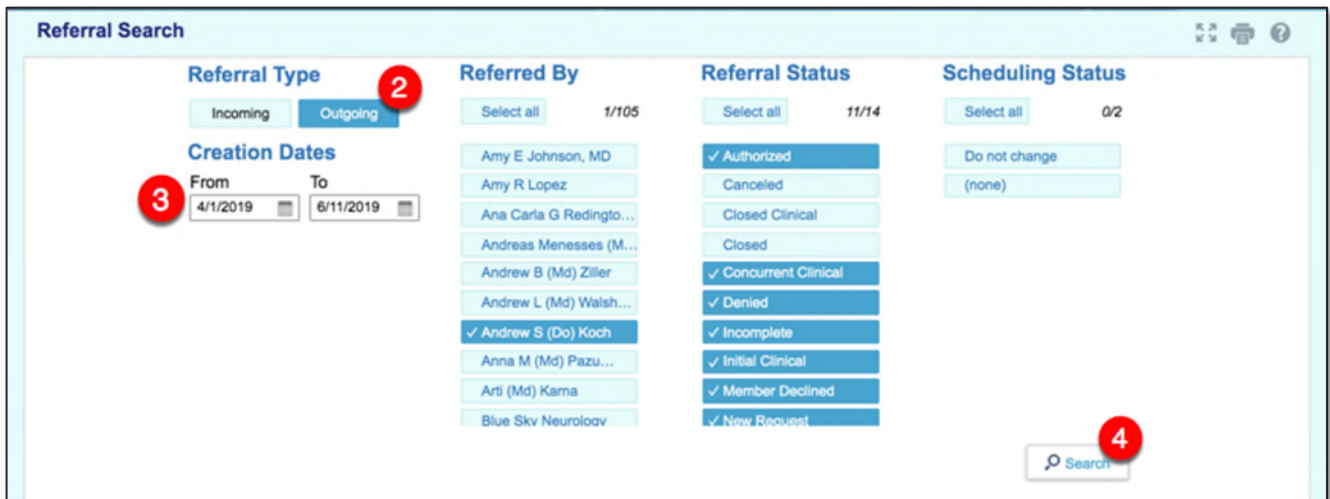
Search for Referrals by Provider or Status

Use the Referral Search activity to look up and review active referrals based on criteria, such as referral status. To search for referrals:

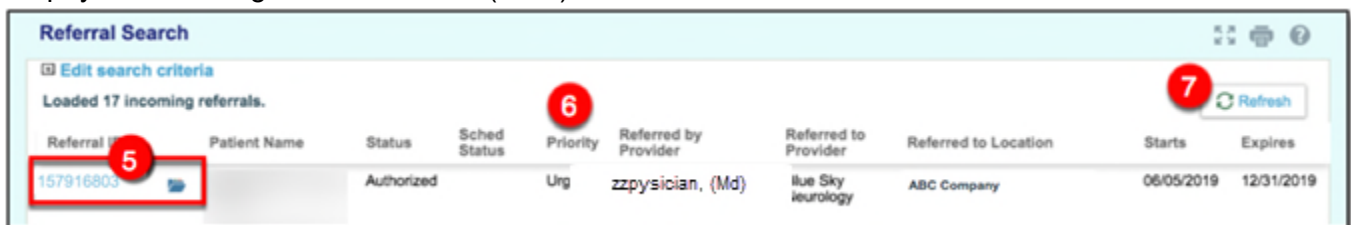
1. Click **Referral Search** in the top toolbar.



2. Click the buttons to specify the criteria that help limit the search results.
3. Set a **date** range for the search.
4. Click **Search**.



5. In the search results, open a specific patient chart by clicking the **Referral ID** link or the **chart icon**.
6. Click column headers to sort the results based on which are most important.
7. Click **Refresh** to manually update the search results. Clean up screen capture “ABC place of service” “Zzphysician” change the **referral ID** (15...).



Search Tips:

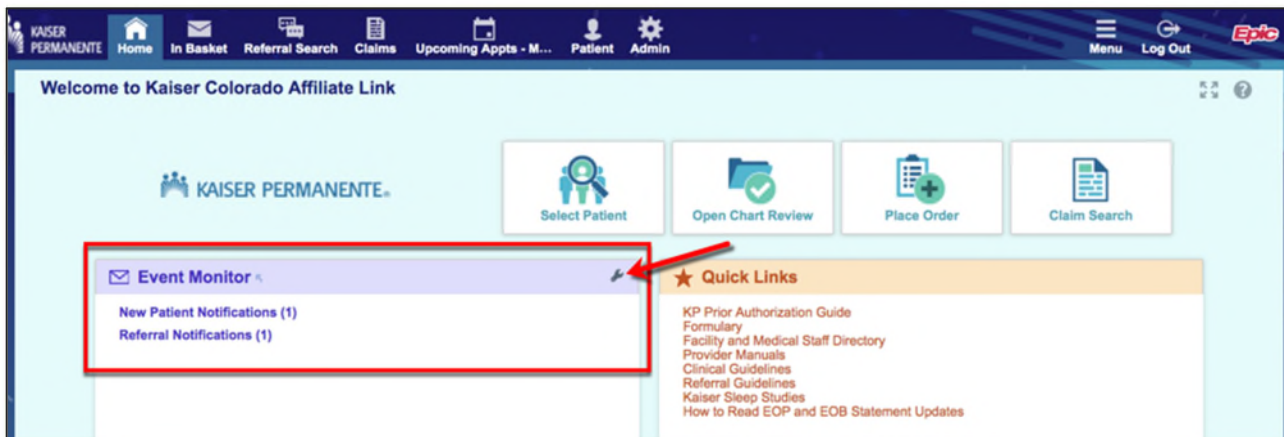
- When you return to Search, the criteria you previously selected is saved, so you don't need to repeatedly select the same criteria.

If you navigate away from the search results and then return, the search results are updated automatically.

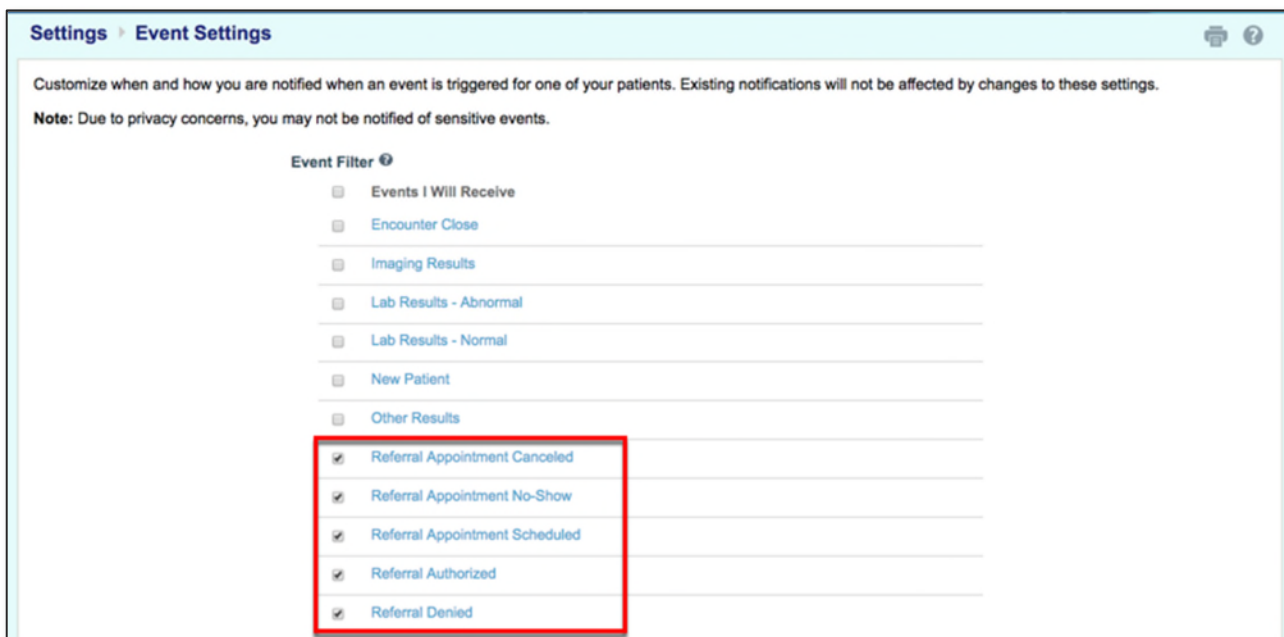
Receive Notification for Referrals

The Event Monitor is located on the Affiliate Link home page. Follow these steps to customize your In Basket notifications for referrals in the Event Monitor:

1. From the Event Monitor window, click the wrench in the upper right corner.




2. Check each of the 5 Referral Notification events for which you would like to receive notifications.
3. Click **Accept** to save your changes.



4. When new referral events occur, the messages will be in the “Referral Notifications” In Basket folder.

Help and Contact Information

For help using an activity, click the question mark  on the upper right of the webpage.

For help with passwords or unable to log in, contact the Provider Relations Department at **1-866-866-3951**.